



HOWARD COUNTY, MARYLAND
OFFICE OF PURCHASING
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Columbia, MD 21046
(410) 313-6370
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ADDENDUM NO. 1

November 19, 2014

Request for Proposal No. 12-2015
Requirements Contract for Special Bond, Tax and Tax Credit Counsel Services
Revised Opening Date: November 25, 2014 @ 11:00 a.m.

This addendum is hereby made a part of this Request for Proposal No. 12-2015. As a result of the pre-proposal conference on November 7, 2014 and questions received by 2 p.m. on November 14, 2014, please note the following changes and submit the proposal accordingly.

Changes

1. The opening date is changed from November 20, 2014 to November 25, 2014 at 11:00 a.m.

2. Section D, page 11, paragraph 1.1, change the third sentence to read as follows:

“their ability to serve as bond or tax counsel, subject to the direction of the County Solicitor, to”

3. Section D, page 13, paragraph 3.1, delete and replace with the following:

3.1 **Prior Experience:**

3.1.1. Bond Counsel Offerors must include in its bond team one or more persons who are listed as bond counsel in the most recent edition of the Bond Buyer’s Directory of Municipal Bond Dealers of the United States (the “Red Book”) and at least one person who is a member of the National Association of Bond Lawyers. Bond Counsel Offerors must have at least three years’ experience acting as counsel to a political subdivision. In addition, Bond Counsel Offerors must have the following experience:

3.1.1.1 Have acted as bond counsel in the issuance of at least three public issues of tax-exempt general obligation bonds or revenue bonds within the last two years.

3.1.1.2 Have acted as bond counsel in at least three competitive or negotiated issuances of tax exempt bonds.

3.1.1.3 **{This section applies only with respect to Offerors for Contract Category 1.5.2}** Have acted within the past three years as bond counsel for a political subdivision of the State of Maryland issuing tax increment financing.

3.1.1.4 **{This section applies only with respect to Offerors for Contract Category 1.5.3.}** Have acted within the last three years as counsel for a

political subdivision of the State of Maryland with respect to purchase of Agricultural Preservation easements by installment purchase agreement or similar debt instrument.

3.1.1.5 **{This section applies only with respect to Offerors for Contract Category 1.5.4.}** Have acted within the last three years as counsel to a political subdivision of the State of Maryland with respect to a Water Quality Loan Program.

3.1.1.6 **{This section applies only with respect to Offerors for Contract Category 1.5.6}** Have acted within the last three years as counsel to a political subdivision of the State of Maryland with respect to issuance of bonds or other debt instruments for housing authorities. Experience with respect to Maryland housing authorities is desirable.

3.1.2 Tax Counsel Offerors shall have acted within the last three years as counsel to a political subdivision with respect to tax matters unrelated to the issuance of debt, including, without limitation, payroll and income tax advice and must have at least three years' experience acting as counsel to a political subdivision.

3.1.3 Tax Credit Counsel Offerors shall have acted within the last three years as counsel to a Housing Authority or an entity in which a Housing Authority owns an interest in matters relating to syndication for the purposes of tax credit incentives for affordable housing projects; have a minimum of ten (10) years demonstrated experience, of which at least three must be experience acting as counsel to a political subdivision; have the capability of performing the potential volume and type of services required; and be available at all times to render services required.

4. Section D, page 14, paragraph 3.3, second sentence, delete the word "bond" and replace with "Bond Counsel".

5. Section D, page 19, paragraph 9.2.2, delete and replace with the following:

"9.2.2 Qualifications, experience and technical competence of the bond, tax or tax credit team of attorneys who will be providing the legal services based on their resumes;"

6. Section E, page 21, paragraph 2.1.4.1.7, delete the second line and replace with the following:

"forth in Section D, Paragraph 3" of this RFP, as follows:"

7. Section E, page 21 paragraph 2.1.4.1.7.3, the first sentence is changed to read:

"2.1.4.1.7.3 (Except for Contract Categories 1.5.7 and 1.5.8), the"

8. Section E, page 21 paragraph 2.1.4.1.7.4, the third line is changed to read:

"requirements of Section D, Paragraph 3.1. of the RFP".

9. Section E, page 21 paragraph 2.1.4.5, second sentence, delete, "five" and replace with "ten".

10. Section E, page 23, paragraph 2.1.7, second and third lines are revised to read as follows:

“for whom the proposed team of attorneys served as bond, tax or tax credit counsel during the last three years. References may be contacted for”

11. Section E, page 23, paragraph number 2.2.1.1.2 is revised to read as follows:

“2.2.1.1.2 The Offeror must submit a schedule of standard hourly rates for each member of its proposed team.”

12. Section E, page 23, item number 2.2.1.1.3, delete and replace with the following:

“2.2.1.1.3 The Offeror must also submit a fixed melded hourly rate of compensation. The Offeror may submit separate pricing for each Contract Category for which a proposal is being submitted. The fixed melded rate will be used in evaluating the proposal and may be accepted as the billing rate at the option of the County. The fixed melded hourly rate of compensation for the services to be performed throughout the initial term of the Contract should include:”

13. Section E, page 24, paragraph 2.2.1.4.4, delete and replace with the following:

“2.2.1.4.4. The Offeror must submit a fixed or not to exceed amount for all standard, competitively sold, general obligation bonds to be issued (Categories 1.5.1 and 1.5.5). This rate should not include out-of-pocket expenses. Out-of-pocket expenses will be reimbursed in only in accordance with the terms of the Contract. The expenses must be reasonable and will be subject to audit by the County.

14. Section F, page 27, Price Proposal cover page, delete and replace with the attached Price Proposal Cover pages 27.1-27.8

15. Section F, page 28, References, delete page and replace with the attached revised References page 28.

Questions

1. Can firms propose different hourly rates depending on the Contract Category for which they are tendering or do they have to propose one rate for all categories?
Answer: Offerors may propose different hourly rates depending on the Contract Category.
2. Would incumbent law firms be allowed to finish off work that they are currently engaged in?
Answer: Depending on the nature of the work, incumbent law firms may be allowed to finish off work that they are currently engaged in, in the County's sole discretion.
3. Which of the Contract Categories in Section D.1.5 covers private activity bonds?
Answer: Category 1.5.5 (Bond Counsel to the County for other bond issuance matters, unrelated to the above) covers private activity bonds.
4. Given the unique corporate structure of our law firm, can a Principal of the legal team provide a signature, when one is required by an Officer, in the Technical Proposal Cover Page (Section F) and Affidavit (Section G) of the RFP?
Answer: Provided that the person has legal authority to sign on behalf of the law firm and verification is provided with the proposal of the signatory's authority, the Principal of the legal team can provide a signature.
5. Are rates of the current contractors available upon request?

Answer: We will not be providing rates of current contractors at this time. We may be in a position to make them available at a later date.

6. Section 2.1.7, which deals with references, does not include two limitations which appear in Section F on pages 28 and 29 (bond counsel during the last 3 years in the second line of item 1 and a reference to a “3 year minimum” in item 2), and those two limitations in section f are arguably inconsistent. Do we have to use references which meet one or both of those limitations and if only one, which one?

Answer: Please see “Revised References” page in this Addendum No. 1.

7. Which law firms are currently serving as counsel to the County in the roles identified in this RFP?

Answer: 1) McGuire Woods LLP, 2) McKennon Shelton & Henn LLP, 3) Miles & Stockbridge, P.C., 4) Funk & Bolton, P.A., 5) Klein Horning LLP, 6) Ballard Spahr Andrews & Ingersoll LLP

8. For purposes of determining blended rates, how does the County define each role (Senior Partner, Junior Partner, Senior Associate, Junior Associate, Other.

Answer: Please see the “Revised Price Proposal Cover” pages in this Addendum No. 1.

Attachments

1. The Pre-Proposal Conference sign in sheet.
2. Revised Price Proposal pages 27.1 through 27.8 of 53.
3. Revised References pages 28 and 29 of 53.

Interviews

The County anticipates scheduling interviews for the week of December 15, 2014.

Please acknowledge addendum by signing below and returning with your proposal. Failure to acknowledge this addendum may be cause for rejection of your proposal.

ADDENDUM RECEIVED BY:

Company Name

Signature

Title

EHB:kea

Pre-bid Conference: 6751 Columbia Gateway Drive, Ste 501
Meeting in conference room 303 on third floor.
RFP No. 12-2015
Special Bond, Tax & Tax Credit Counsel Services
Friday, November 7, 2014 @ 1p.m.

IT IS IMPORTANT TO COMPLETE THE GRAY AREAS OF THIS FORM AS IT WILL ASSIST HOWARD COUNTY'S ONGOING EFFORTS TO OBTAIN MBE/DBE/WBE PARTICIPATION.

PRINTED NAME OF REPRESENTATIVE	COMPANY NAME	IS YOUR COMPANY EEO/MBE CERTIFIED?	TELEPHONE & FAX NUMBER	E-MAIL ADDRESS	INTERESTED IN BEING A SUB- CONTRACTOR? CHECK HERE
Evangelina Bokke	Ho. Co. Road		410-313-6373	dodds@howardcountymd.gov	
Morenike Oyewusi	Ho. Co. Office Law		410-313-4216	morenike@howardcountymd.gov	
Lindsey Deitz	Whiteford Taylor Preston		410-659-6436	ldeitz@wtpa.com	
NATALIA PEARSON-FARRER	MCGUIRE WOODS		410.659.4427	NPEARSON@FARRER MCGUIREWOODS.COM	
Gordon Knix	Miles & Stockbridge		410-385-3644	gknix@milesstockbridge.com	
Paul Casey	Ballard Spahn		410.538.5694	Casey.p@ballardspahn.com	
ROBERT DOORY	Miles & Stockbridge		410-385-3487	RDOORY@MILESSTOCKBRIDGE.COM	
Damian Mark	Mckenzie Shelton & Han		410-843-3540	damian.mark@gsmlp.com	
Luisella McBride	Haramoff Naberger LLP		410.539.8389	lmcbride@abnmc.com	
Ana Cronk	Ho. Co. Purchasing		410.313.6384	acronk@howardcountymd.gov	
Shirley Chester	Ho. Co. Purch		XL0519	schester@howardcountymd.gov	

SECTION F

REVISED PRICE PROPOSAL COVER PAGE

(Must be submitted separately from the Technical portion of the proposal)

Bond Counsel for the County's annual bond issuance(s) (Item 1.5.1)

COMPANY NAME: _____

TITLE: Requirements Contract for Special Bond, Tax and Tax Credit Counsel Services

NIGP CODE/PRODUCT CODE: 961-49 Miscellaneous Professional Services, Legal Services Attorneys

ITEM NO.	DESCRIPTION	
1.	Attorney Hourly Melded Rate	\$ _____
2.	Para-Professional Hourly Melded Rate	\$ _____
3.	Fixed or not to exceed amount for all standard, competitively sold, general obligation bonds to be issued	\$ _____

ADDITIONAL PRICING REQUIRED FOR EACH PROPOSED TEAM MEMBER, RANKED IN ORDER OF SENIORITY. INDICATE EACH MEMBER'S TITLE, E.G. SENIOR PARTNER, JUNIOR PARTNER, SENIOR ASSOCIATE, ETC.:

4.	_____	Hourly Rate	\$ _____
5.	_____	Hourly Rate	\$ _____
6.	_____	Hourly Rate	\$ _____
7.	_____	Hourly Rate	\$ _____
9.	_____	Hourly Rate	\$ _____

INVOICE PROCEDURE FOR SUCCESSFUL CONTRACTORS: In order to facilitate prompt payment, invoices must contain the above commodity and/or service descriptions and pricing. Invoices failing to contain the required line item detail, including contract line number and unit pricing, may be returned for correction. Please submit a sample invoice with the response.

THE PERSON SIGNING THE PRICE PAGE MUST INITIAL ANY ALTERATIONS IN FIGURES IN INK.

SIGNATURE: _____ DATE: _____

PRINTED NAME: _____ TITLE: _____

SECTION F

REVISED PRICE PROPOSAL COVER PAGE

(Must be submitted separately from the Technical portion of the proposal)

Bond Counsel to the County with respect to its Tax Increment Financing Program (Item 1.5.2)

COMPANY NAME: _____

TITLE: Requirements Contract for Special Bond, Tax and Tax Credit Counsel Services

NIGP CODE/PRODUCT CODE: 961-49 Miscellaneous Professional Services, Legal Services Attorneys

ITEM NO.	DESCRIPTION	
1.	Attorney Hourly Melded Rate	\$ _____
2.	Para-Professional Hourly Melded Rate	\$ _____

ADDITIONAL PRICING REQUIRED FOR EACH PROPOSED TEAM MEMBER, RANKED IN ORDER OF SENIORITY. INDICATE EACH MEMBER’S TITLE, E.G. SENIOR PARTNER, JUNIOR PARTNER, SENIOR ASSOCIATE, ETC.:

3.	_____	Hourly Rate	\$ _____
4.	_____	Hourly Rate	\$ _____
5.	_____	Hourly Rate	\$ _____
6.	_____	Hourly Rate	\$ _____
7.	_____	Hourly Rate	\$ _____

INVOICE PROCEDURE FOR SUCCESSFUL CONTRACTORS:

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ALTERATIONS IN FIGURES IN INK.**

SIGNATURE: _____ DATE: _____

PRINTED NAME: _____ TITLE: _____

SECTION F
REVISED PRICE PROPOSAL COVER PAGE

(Must be submitted separately from the Technical portion of the proposal)

**Bond Counsel to the County for the Agricultural Preservation Program Installment Purchase
Agreements (Item 1.5.3)**

COMPANY NAME: _____

TITLE: Requirements Contract for Special Bond, Tax and Tax Credit Counsel Services

NIGP CODE/PRODUCT CODE: 961-49 Miscellaneous Professional Services, Legal Services Attorneys

ITEM NO.	DESCRIPTION	
1.	Attorney Hourly Melded Rate	\$ _____
2.	Para-Professional Hourly Melded Rate	\$ _____

ADDITIONAL PRICING REQUIRED FOR EACH PROPOSED TEAM MEMBER, RANKED IN ORDER OF SENIORITY. INDICATE EACH MEMBER'S TITLE, E.G. SENIOR PARTNER, JUNIOR PARTNER, SENIOR ASSOCIATE, ETC.:

3.	_____	Hourly Rate	\$ _____
4.	_____	Hourly Rate	\$ _____
5.	_____	Hourly Rate	\$ _____
6.	_____	Hourly Rate	\$ _____
7.	_____	Hourly Rate	\$ _____

INVOICE PROCEDURE FOR SUCCESSFUL CONTRACTORS:

In order to facilitate prompt payment, invoices must contain the above commodity and/or service descriptions and pricing. Invoices failing to contain the required line item detail, including contract line number and unit pricing, may be returned for correction. Please submit a sample invoice with the response.

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ALTERATIONS IN FIGURES IN INK.**

SIGNATURE: _____ DATE: _____

PRINTED NAME: _____ TITLE: _____

SECTION F

REVISED PRICE PROPOSAL COVER PAGE

(Must be submitted separately from the Technical portion of the proposal)

Bond Counsel to the County for the Water Quality Loan Program (Item 1.5.4.)

COMPANY NAME: _____

TITLE: Requirements Contract for Special Bond, Tax and Tax Credit Counsel Services

NIGP CODE/PRODUCT CODE: 961-49 Miscellaneous Professional Services, Legal Services Attorneys

ITEM NO.	DESCRIPTION
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1. Attorney Hourly Melded Rate \$ _____

2. Para-Professional Hourly Melded Rate \$ _____

ADDITIONAL PRICING REQUIRED FOR EACH PROPOSED TEAM MEMBER, RANKED IN ORDER OF SENIORITY. INDICATE EACH MEMBER'S TITLE, E.G. SENIOR PARTNER, JUNIOR PARTNER, SENIOR ASSOCIATE, ETC.:

3. _____ Hourly Rate \$ _____

4. _____ Hourly Rate \$ _____

5. _____ Hourly Rate \$ _____

6. _____ Hourly Rate \$ _____

7. _____ Hourly Rate \$ _____

INVOICE PROCEDURE FOR SUCCESSFUL CONTRACTORS:

In order to facilitate prompt payment, invoices must contain the above commodity and/or service descriptions and pricing. Invoices failing to contain the required line item detail, including contract line number and unit pricing, may be returned for correction. Please submit a sample invoice with the response.

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SIGNATURE: _____ DATE: _____

PRINTED NAME: _____ TITLE: _____

SECTION F

REVISED PRICE PROPOSAL COVER PAGE

(Must be submitted separately from the Technical portion of the proposal)

Bond Counsel to the County for other bond issuance matters, unrelated to the above (Item 1.5.5)

COMPANY NAME: _____

TITLE: Requirements Contract for Special Bond, Tax and Tax Credit Counsel Services

NIGP CODE/PRODUCT CODE: 961-49 Miscellaneous Professional Services, Legal Services Attorneys

ITEM NO.	DESCRIPTION	
1.	Attorney Hourly Melded Rate	\$ _____
2.	Para-Professional Hourly Melded Rate	\$ _____
3.	Fixed or not to exceed amount for all standard, competitively sold, general obligation bonds to be issued	\$ _____

ADDITIONAL PRICING REQUIRED FOR EACH PROPOSED TEAM MEMBER, RANKED IN ORDER OF SENIORITY. INDICATE EACH MEMBER'S TITLE, E.G. SENIOR PARTNER, JUNIOR PARTNER, SENIOR ASSOCIATE, ETC.:

4.	_____	Hourly Rate	\$ _____
5.	_____	Hourly Rate	\$ _____
6.	_____	Hourly Rate	\$ _____
7.	_____	Hourly Rate	\$ _____
8.	_____	Hourly Rate	\$ _____

INVOICE PROCEDURE FOR SUCCESSFUL CONTRACTORS:

In order to facilitate prompt payment, invoices must contain the above commodity and/or service descriptions and pricing. Invoices failing to contain the required line item detail, including contract line number and unit pricing, may be returned for correction. Please submit a sample invoice with the response.

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SIGNATURE: _____ DATE: _____

PRINTED NAME: _____ TITLE: _____

SECTION F
REVISED PRICE PROPOSAL COVER PAGE
(Must be submitted separately from the Technical portion of the proposal)
Bond Counsel to the Howard County Housing Commission (Item 1.5.6)

COMPANY NAME: _____

TITLE: Requirements Contract for Special Bond, Tax and Tax Credit Counsel Services

NIGP CODE/PRODUCT CODE: 961-49 Miscellaneous Professional Services, Legal Services Attorneys

ITEM NO.	DESCRIPTION
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1. Attorney Hourly Melded Rate \$ _____

2. Para-Professional Hourly Melded Rate \$ _____

ADDITIONAL PRICING REQUIRED FOR EACH PROPOSED TEAM MEMBER, RANKED IN ORDER OF SENIORITY. INDICATE EACH MEMBER'S TITLE, E.G. SENIOR PARTNER, JUNIOR PARTNER, SENIOR ASSOCIATE, ETC.:

3. _____ Hourly Rate \$ _____

4. _____ Hourly Rate \$ _____

5. _____ Hourly Rate \$ _____

6. _____ Hourly Rate \$ _____

7. _____ Hourly Rate \$ _____

INVOICE PROCEDURE FOR SUCCESSFUL CONTRACTORS:

In order to facilitate prompt payment, invoices must contain the above commodity and/or service descriptions and pricing. Invoices failing to contain the required line item detail, including contract line number and unit pricing, may be returned for correction. Please submit a sample invoice with the response.

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SIGNATURE: _____ DATE: _____

PRINTED NAME: _____ TITLE: _____

SECTION F

REVISED PRICE PROPOSAL COVER PAGE

(Must be submitted separately from the Technical portion of the proposal)

Tax Counsel (on matters unrelated to the reissuance of debt) to Howard County (Item 1.5.7)

COMPANY NAME: _____

TITLE: Requirements Contract for Special Bond, Tax and Tax Credit Counsel Services

NIGP CODE/PRODUCT CODE: 961-49 Miscellaneous Professional Services, Legal Services
Attorneys

ITEM NO.	DESCRIPTION
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1. Attorney Hourly Melded Rate \$ _____

2. Para-Professional Hourly Melded Rate \$ _____

ADDITIONAL PRICING REQUIRED FOR EACH PROPOSED TEAM MEMBER, RANKED IN ORDER OF SENIORITY. INDICATE EACH MEMBER'S TITLE, E.G. SENIOR PARTNER, JUNIOR PARTNER, SENIOR ASSOCIATE, ETC.:

3. _____ Hourly Rate \$ _____

4. _____ Hourly Rate \$ _____

5. _____ Hourly Rate \$ _____

6. _____ Hourly Rate \$ _____

7. _____ Hourly Rate \$ _____

INVOICE PROCEDURE FOR SUCCESSFUL CONTRACTORS:

In order to facilitate prompt payment, invoices must contain the above commodity and/or service descriptions and pricing. Invoices failing to contain the required line item detail, including contract line number and unit pricing, may be returned for correction. Please submit a sample invoice with the response.

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SIGNATURE: _____ DATE: _____

PRINTED NAME: _____ TITLE: _____

SECTION F

REVISED PRICE PROPOSAL COVER PAGE

(Must be submitted separately from the Technical portion of the proposal)

Tax Credit Counsel for the Howard County Housing Commission (Item 1.5.8)

COMPANY NAME: _____

TITLE: Requirements Contract for Special Bond, Tax and Tax Credit Counsel Services

NIGP CODE/PRODUCT CODE: 961-49 Miscellaneous Professional Services, Legal Services Attorneys

ITEM NO.	DESCRIPTION
----------	-------------

1. Attorney Hourly Melded Rate \$ _____

2. Para-Professional Hourly Melded Rate \$ _____

ADDITIONAL PRICING REQUIRED FOR EACH PROPOSED TEAM MEMBER, RANKED IN ORDER OF SENIORITY. INDICATE EACH MEMBER'S TITLE, E.G. SENIOR PARTNER, JUNIOR PARTNER, SENIOR ASSOCIATE, ETC.:

3. _____ Hourly Rate \$ _____

4. _____ Hourly Rate \$ _____

5. _____ Hourly Rate \$ _____

6. _____ Hourly Rate \$ _____

7. _____ Hourly Rate \$ _____

INVOICE PROCEDURE FOR SUCCESSFUL CONTRACTORS:

In order to facilitate prompt payment, invoices must contain the above commodity and/or service descriptions and pricing. Invoices failing to contain the required line item detail, including contract line number and unit pricing, may be returned for correction. Please submit a sample invoice with the response.

**THE PERSON SIGNING THE PRICE PAGE MUST INITIAL ANY
ALTERATIONS IN FIGURES IN INK.**

SIGNATURE: _____ DATE: _____

PRINTED NAME: _____ TITLE: _____

SECTION F

REVISED REFERENCES
(Must be submitted with the Technical proposal)

COMPANY NAME: _____

1. References: Give name, address, and telephone number of governmental clients for whom the Contractor served as bond, tax or tax credit counsel during the past three years.

1.1.	Account Name	Contract Completion Date
	_____	_____
	Owner/Manager	Telephone
	_____	_____
	Address	Email
	_____	_____

1.2.	Account Name	Contract Completion Date
	_____	_____
	Owner/Manager	Telephone
	_____	_____
	Address	Email
	_____	_____

1.3.	Account Name	Contract Completion Date
	_____	_____
	Owner/Manager	Telephone
	_____	_____
	Address	Email
	_____	_____

1.4.	Account Name	Contract Completion Date
	<hr/>	<hr/>
	Owner/Manager	Telephone
	<hr/>	<hr/>
	Address	Email
	<hr/>	<hr/>
	<hr/>	<hr/>
	<hr/>	<hr/>
1.5.	Account Name	Contract Completion Date
	<hr/>	<hr/>
	Owner/Manager	Telephone
	<hr/>	<hr/>
	Address	Email
	<hr/>	<hr/>
	<hr/>	<hr/>
	<hr/>	<hr/>

2. The Contractor has provided the above services for ____ years.